



SOP: MBI Claim Process

Purpose

This SOP is intended to outline how an MBI claim should be processed along with initial contact for an MBI contract for general and powertrain claims. These claims are time sensitive and must be handled per job aid.

Teams Impacted

- General Claims
- Powertrain Claims
- Claims Support Team

Related References or Documents

- SOP: for Contract Holder Search & Verification
- SOP: How to start a Claim or Log Interaction

Procedure

1. Follow **SOP: Contract Holder Search & Verification** to pull up contract/ claim information. If the contract starts with MB this will clearly indicate this is an MBI contract.
 - a. Once contract is pulled up check for existing claim, if a claim is started then refer to step 2.
 - b. If there is no claim started, then a claim must be started whether the repairs are eligible or not. Continue to step 3.

Important! Do not inform of any coverage during the call this must be reviewed by a California licensed adjuster. ALL questions must be directed to MBI team listed in Step 2B via Teams.

▼ Claim Details

Claim Number	Claim Type	Claim Status	Adjuster	Repair Facility
2020128	MBI	Open	Bradley Carey	94520 CONCORD NISSAN

Related

Details

Interactions

Estimate

Coverage Details

Notes

Source/Order Parts

Authorizations

Payable

▼ Information

Claim Number	Owner Name
2020128	Bradley Carey
Account	Paid
ASHLEY LONG	\$5,299.15
Contact	Policy Number
	MBIQ104020
Claim Type	Contract Sequence
MBI	
Status	Insured Asset
Open	IPA-01462807
Processing Status	Repair Facility
Repair	94520 CONCORD NISSAN
Claim Paid Status	Repair Facility Contact

Service Contract

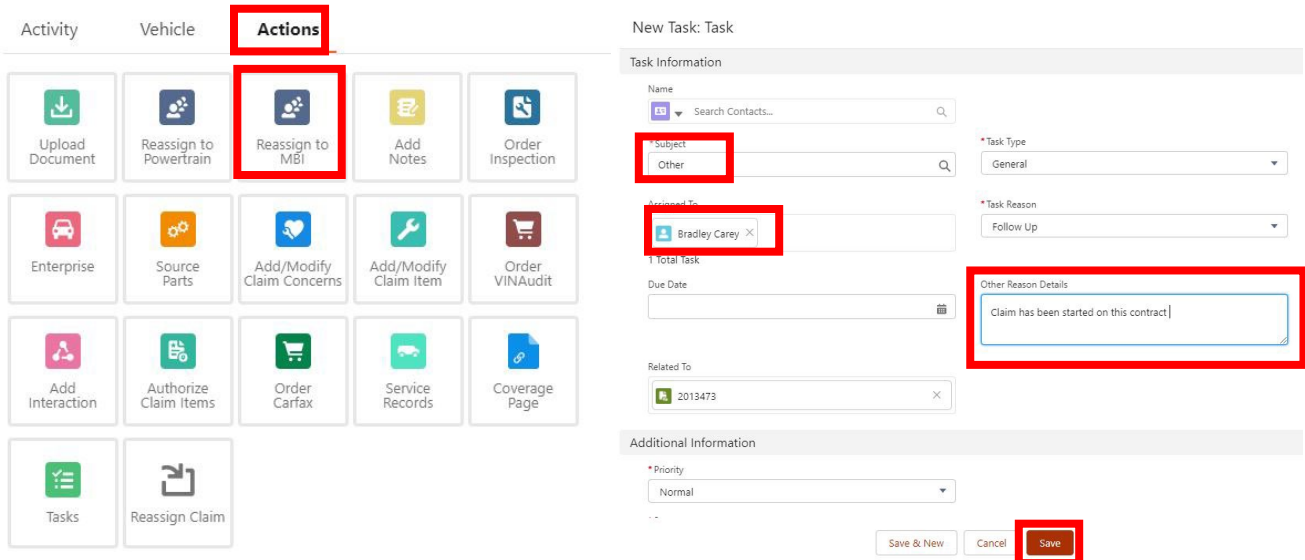
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2. If the claim has been authorized or denied by a licensed adjuster this information can be relayed to the repair facility/contract holder.
 - a. All part options and OOP cost must be authorized by contract holder.
 - b. If claim changes are needed, OOP cost/part options need to be authorized,
 - i. Reach out to MBI adjusters, William "Bill" Berleth, Tyler Wolland, or Johnnie Kelly.
 - c. If a claim needs to be escalated task to Bradley Carey or Zach Archer for review.
3. Start a claim using **SOP: How to start a Claim or Pre-claim**.
 - a. Whether the part(s) are listed or not listed for coverage, an estimate must be keyed with cost of parts and labor to be sent to the MBI team.

Important! Do not request any tear down or disassembly unless noted in the claim.

4. MBI claims must be sent to MBI team by clicking **[Assign to MBI]**. Then task to the assigned adjuster that a new claim has been open.



The screenshot displays the 'New Task: Task' form in the American Auto Shield system. The 'Actions' tab is selected, and the 'Reassign to MBI' button is highlighted. The form fields are as follows:

- Name:** Search Contacts...
- Subject:** Other
- Assigned To:** Bradley Carey
- Due Date:** (empty)
- Related To:** 2013473
- Task Type:** General
- Task Reason:** Follow Up
- Other Reason Details:** Claim has been started on this contract
- Priority:** Normal
- Buttons:** Save & New, Cancel, Save

5. Inform repair facility claim is under review with MBI TEAM, and they assigned adjuster will reach out to them within 24hrs.
6. Note the call in the claim in detail with any relevant information such as:
 - a. Direct contact information extensions/email.
 - b. Allow parts to be shipped.
 - c. Powertrain claims must have all pre-tear down diagnosis notes.

Approval & Revision

Date Created 5/19/2022	Created By Johnnie Martinez	Date Approved 5/19/2022	Approved By Jason Dolan
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Date Revised 8/17/2022	Revised by Bradley Carey	Revision Description Updated verbiage	Date Approved 8/16/2022	Approved By Johnnie Martinez
Date Revised 9/6/2022	Revised by Johnnie Martinez	Revision Description Updated Process where to task for assignment	Date Approved 9/7/2022	Approved By Jason Dolan
Date Revised 5/24/2023	Revised by Johnnie Martinez	Revision Description Removed a step to simplify process. Updated verbiage	Date Approved 7/7/2023	Approved By Jason Dolan
Date Revised [Date]	Revised by [Revisor Name]	Revision Description [Enter what has changed from the previous version]	Date Approved [Date]	Approved By [Approver's Name]